



Syssero[®] Solution Packet

Finding & Merging Duplicate Candidates



Solution Overview

Within Recruiting, Workday® will recognize the possibility of a duplicate candidate, or if a candidate is a current/former employee. Thanks to the Check for Duplicates & Merging functionality, this process can be quite easy and save you loads of time in the future.

You can use duplicate merging to:

- Identify duplicate external candidates who applied multiple times for the same or different positions.
- Identify former (terminated) workers by asking candidates previous worker questions.
- Identify internal existing employee candidates who applied through your external career sites instead of internally.

Impacted Functional Areas

- **Recruiting**

Step 1: Check for duplicates

You can check for duplicates at any time during the recruiting process by checking the Duplicates tab on the Overview section of the candidate profile.

The screenshot displays the Workday Recruiting interface for a candidate profile. The left sidebar shows navigation options: Summary, Overview (highlighted with a red box), Attachments, Interview, Screening, Employment Offer, Personal Notes, Recruiting History, Activity, and Reminders. The main content area shows the 'Overview' section with tabs for Overview, Duplicates (highlighted with a red box), Candidate Communication, Application Changes, and Tags / Pools. Below the tabs, there is a section titled 'Potential Duplicates' with 20 items. A table lists these potential duplicates with columns for Type, Name, Match Reasons, Merge, and Remove.

Type	Name	Match Reasons	Merge	Remove
Employee	Jonathan Smith (1000529)	Jonathan Smith		Remove
Candidate	Jonathan Smith	Jonathan Smith	Merge	Remove
Employee	Jermaine Smith (1002261)	J Smith		Remove
Employee	Jeremiah Smith (1002926)	J Smith		Remove
Employee	Johanny Smith (1001355)	J Smith		Remove
Employee	Jeanne Smith (1000253)	J Smith		Remove
Candidate	Joshua Smith	J Smith	Merge	Remove
Candidate	Jacob Smith	J Smith	Merge	Remove
Candidate	Jason Smith	J Smith	Merge	Remove



On this screen, all potential duplicate candidates will be listed with the following:

- **Type:** Will list if your candidate is the potential duplicate of another Candidate or Employee
- **Name:** The name of all other candidates, former or existing employees which may be duplicate of your candidate. *Note: If the potential duplicate is a FORMER worker, it will list (Terminated) at the end of their name.*
- **Match Reason:** The reason the potential duplicate was flagged by the system. Either their Name or Contact information matches that of another candidate, former or existing employee.

Step 2: Remove Non-Duplicates

Select Remove if the potential duplicate listed, is in fact, NOT a duplicate of your candidate. Select the Confirm box, Ok and Done. Repeat this process until all are removed who are not duplicates.

The screenshot shows the 'Potential Duplicates' section for Jonathan Smith. The table lists three items:

Type	Name	Match Reasons	Merge	Remove
Employee	Jonathan Smith (1000529)	Jonathan Smith		Remove
Candidate	Jonathan Smith	Jonathan Smith	Merge	Remove
Employee	Jeanne Smith (1000253)	J Smith		Remove

Step 3: Merge Duplicates

If the candidate is a duplicate, you will select Merge with another candidate record or former employee/pre-hire record. *Note: If the duplicate is a CURRENT employee, please instruct the candidate to apply as an Internal Candidate via the Find Jobs report in Workday.*

The screenshot shows the 'Potential Duplicates' section for Jonathan Smith. The table lists three items:

Type	Name	Match Reasons	Merge
Employee	Jonathan Smith (1000529)	Jonathan Smith	
Candidate	Jonathan Smith	Jonathan Smith	Merge
Employee	Jeanne Smith (1000253)	J Smith	

2



Select the target candidate to merge with, and the job application(s) & recruiting information will move to this person. Workday will keep the latest updated data.

The merged record keeps the Candidate Home account of the candidate with the last updated email address. Workday keeps personal information on the last updated record or appends it where possible. The grid displays a summary of the merge and the data that will move to the merged record. Select Ok.

Merge Candidates Jonathan Smith

Workday has modified and enhanced the Duplicate Management functionality. Data fields and relationships will be merged according to pre-set merge rules delivered by Workday. A description of the Duplicate Management functionality, including field-level descriptions of the merge rules, can be found on the Workday What's New on Duplicate Candidate Merging on Workday's Community website. The team responsible for administering Workday for your company should be able to assist you with accessing the merge rules. Prior to using this functionality, end users should understand how the functionality operates and their employers' expectations for data management and retention.

If the merge involves a contingent worker or employee, they must be the merge target.

2 items

	Name	Type	Email Addresses	Job Applications	Last Application Date	Phone Numbers	Addresses
<input type="checkbox"/>	Jonathan Smith	Pre-Hire		Jonathan Smith - JR0001010 Administrative Assistant	08/28/2023		
<input checked="" type="checkbox"/>	Johnny Smith (Terminated) (1001355)	Employee					

The grid below displays a summary of the merge and the data that will move to the merged record.

1 item

From	Information to be Merged	To	Merged Result
Jonathan Smith	Job Applications Jonathan Smith - JR0001010 Administrative Assistant Username johnsmith@noemail.com	Johnny Smith (Terminated) (1001355)	Job Applications Jonathan Smith - JR0001010 Administrative Assistant Legal Name Johnny Smith Username

OK Cancel

“Merge with Other” allows you to manually search for potential duplicates that the system may not have flagged.

Jonathan Smith
For: JR0001010 Administrative Assistant

Actions
Email

Summary
Overview
Attachments
Questionnaire Results
Interview
Screening

Overview Duplicates Candidate Communication Application Changes Tags / Pools

Potential Duplicates 4 items

Type	Name	Match Reasons	Merge	Remove
Employee	Johnny Smith (Terminated) (1001355)	J Smith	Merge	Remove
Candidate	Jennifer Smith	J Smith	Merge	Remove
Candidate	Jessica Smith	J Smith	Merge	Remove
Candidate	Jacob Smith	J Smith	Merge	Remove

Merge with Other



If you have incorrectly merged Candidates, you can unmerge records by running the **Merged Candidates** report and then **Unmerge**.

Merged Candidates

Merged After * 07/01/2023

Merged Before 08/08/2023

Candidates



Merged Candidates

1 item

Person Merged From	Person Merged To	Merged On	Merged Information	Action
Jonathan Smith added on 08/02/2023, 7:14:32 AM	Johnny Smith on 08/07/2023, 11:21:38 AM	08/07/2023 12:45:45 688 PM	Job Applications	<input type="button" value="Unmerge"/>

And that's it - you can now find, merge, and unmerge your duplicates. We hope this helps!

For help or more info, reach out to info@syssero.com